OpenMIC Installation and Configuration Manual

Bibliographic Utility for analog and digital objects

Version 1.0 beta
Updated on August 12, 2009

OpenMIC User Manual

Bibliographic Utility for analog and digital objects

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I. Introduction

OpenMIC is an open source, web-based bibliographic utility that can be used as a standalone application or integrated with other repository architectures by a wide range of organizations. It provides a complete metadata creation system for analog and digital materials, with services to export these metadata in standard formats.

The bibliographic utility features a METS data architecture which can be used in any METS-based or METS-compliant environment. It uses MODS as an underlying metadata schema for descriptive MD, NISO/AES standard for technical MD and PREMIS for source MD and rights MD. It outputs an XML wrapper for the METS components as a single object.

The bibliographic utility data model is primarily an event-based data model, intended to document what happens to a resource at a specific time and place. Preservation and condition events, provenance events, rights events, and descriptive events document what happens to a resource throughout its lifecycle. Details of the events can include associated entities (such as an exhibit curator) and associated objects (such as an exhibit catalog).

OpenMIC is a core application for the Moving Image Collections (MIC) initiative developed at the Rutgers University Libraries with funding from the Library of Congress, the Institute of Museum and Library Services, and the National Science Foundation.

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II. Using this Manual

There are two sections in this manual.

Section 1 gives an overview diagram of the OpenMIC modules.

Section 2 describes how to configure OpenMIC according to your organization policies.

Section 1: OpenMIC Overview Diagram

An overview diagram of the OpenMIC is shown in Figure 1.0. The OpenMIC software consists of several distinct modules, and some of the high level modules are shown here.

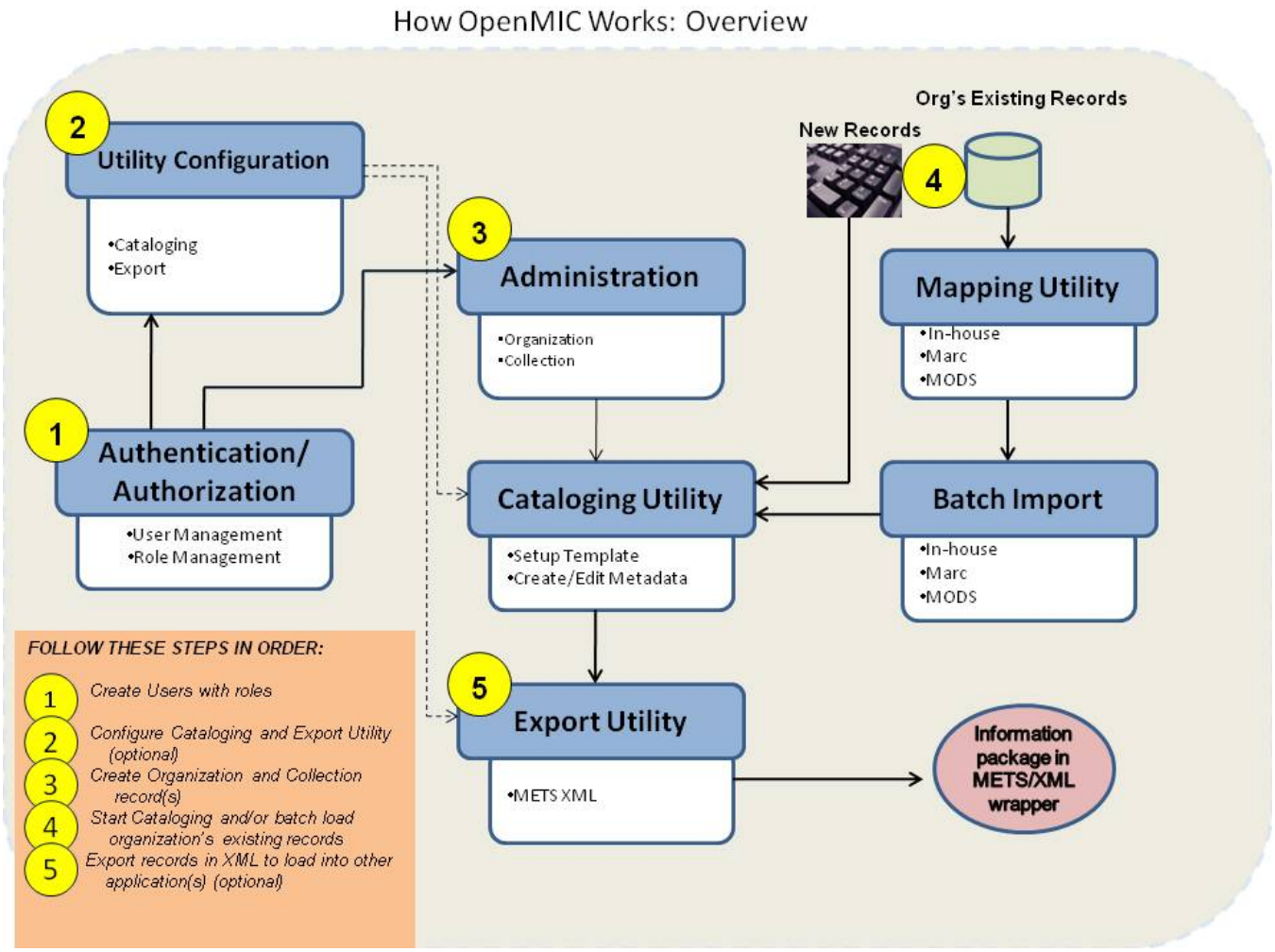

Figure 1.1: Overview diagram of the OpenMIC

1. Configuration module allows administrators to configure metadata cataloging form, required elements, and default values according to organization or collection policies.
2. Administration module allows administrators and/or users to manage organizations, collections, and to perform database cleanup.
3. Authentication/Authorization module allows users to manage user accounts and the roles according to organization or collection policies.

4. Metadata and Digital objects module allows users to create, edit, or delete cataloging records, define required elements and create templates for a collection, map schemas, import, and export metadata.
5. Export module allows users to export metadata in METS XML, Marc XML, or MODS xml format.
6. Mapping Utility allows users to map organization's existing records to OpenMIC database.
7. Batch Import module allows users to batch load records from existing database.

Section 2: Installing and Configuring OpenMIC

A. Installation of OpenMIC Bibliographic Utility

Please refer to the README.txt file which is included in the OpenMIC download package.
To download the package, go to:
http://rucore.libraries.rutgers.edu/open/dl/index.php?openmic

After the installation of OpenMIC is completed, you may either start using the system as delivered or configure the system according to your organization policies.

If you are ready to use OpenMIC as delivered, proceed create organization and collection before start creating metadata. Refer to the OpenMIC user manual.

http://rucore.libraries.rutgers.edu/open/projects/openmic/openmic-user-manual.pdf

B. Configuring OpenMIC

OpenMIC can be used as delivered or it can be configured according to the organization policies. After the software is installed, the administrator must create a super user account and perform some administrative tasks before using the system. The steps are explained below:

Step 1: Manage User Account (Figures 1.1.1 to 1.1.3)

The software is delivered with a default user name and password. As soon as the software is installed, the administrator should log in with the delivered user name and password and create a super user account. Once the super user account is created, the delivered user name and password become invalid. Follow the instructions below to create a super user account.

a) Login with the default user name and password.
b) Select ***Manage User Account*** from the main menu.
c) Enter User information and click ***Submit.***
d) Next you need to assign super user role for this user. Select the user you have just created and click ***Assign Role(s).***

e) Select ***Yes*** to assign super user role and click ***Submit***.
f) Select ***Cancel*** to go to the OpenMIC initial screen.

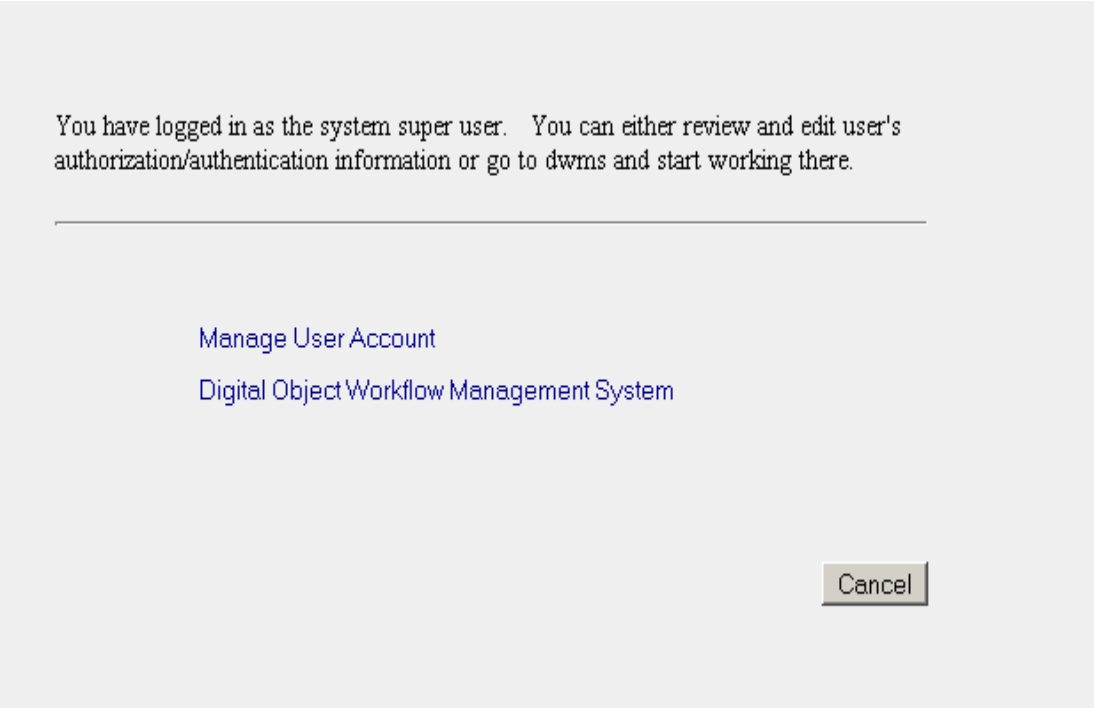
You have logged in as the system super user. You can either review and edit user's authorization/authentication information or go to dwms and start working there.
Manage User Account
Digital Object Workflow Management System
Cancel

Figure 1.1: OpenMIC initial screen

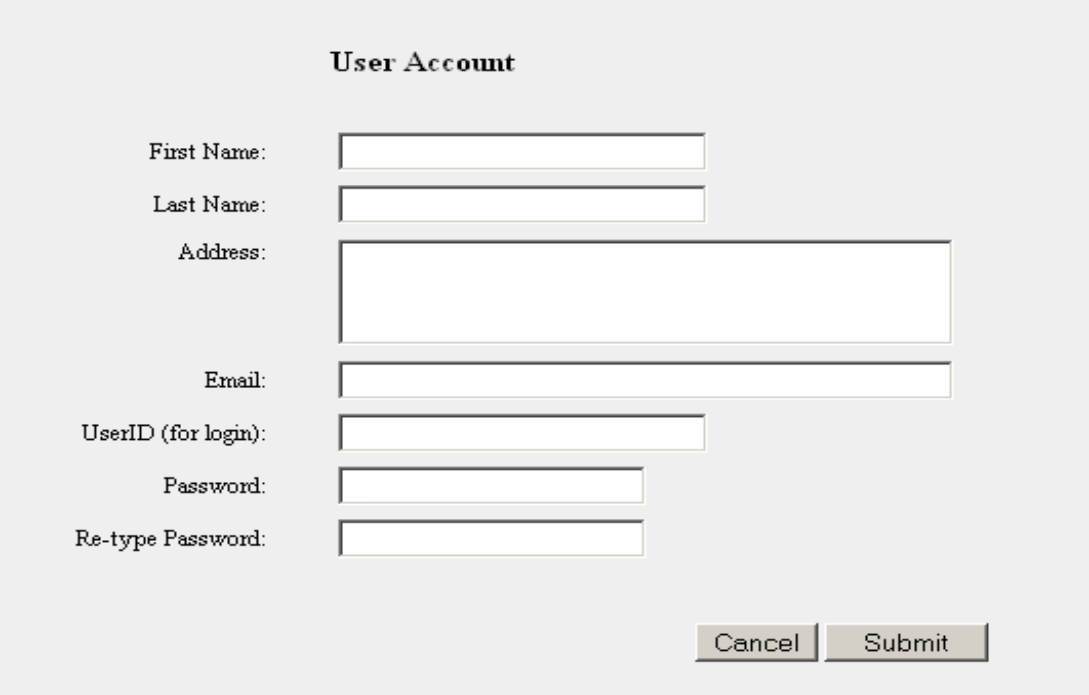

Figure 1.2: User account screen

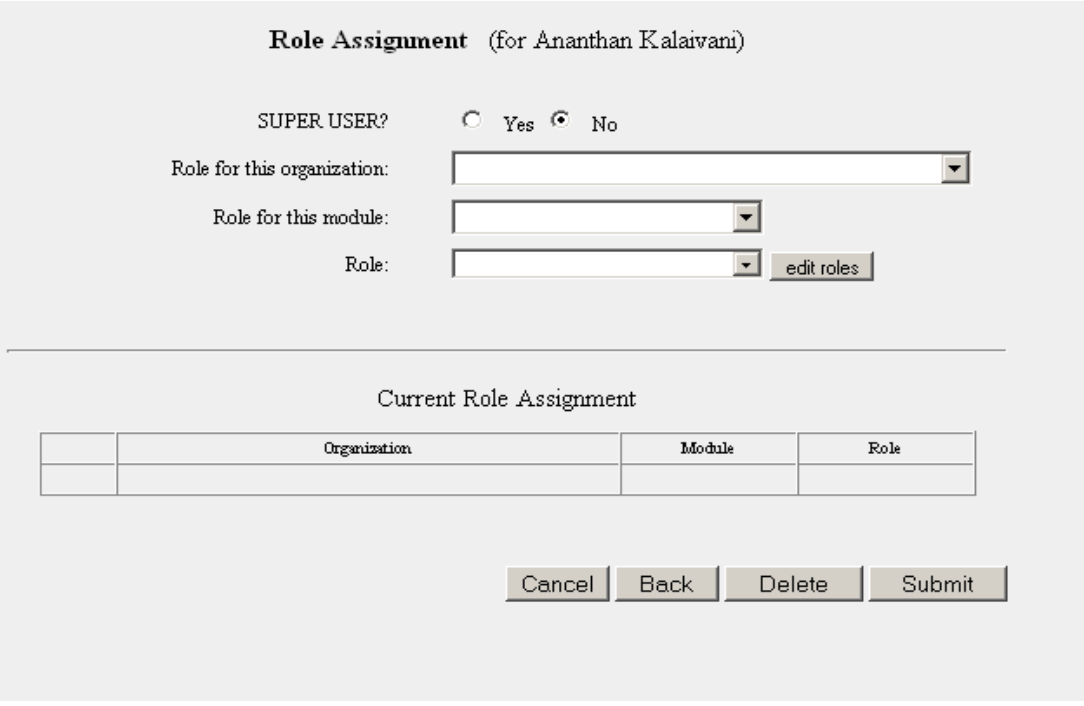

Figure 1.3: Role assignment screen

Step 2: Digital Workflow Management System

This step is optional. The configuration module allows organizations to select the elements to appear on the cataloging form and to set the system-wide required elements as well as system-supplied values according to the organization policies. Go through each of the configuration options and make appropriate selections according to your organization policies.

1) Metadata cataloging (Figures 2.1.1 to 2.1.22)

1.1) Schema Builder

The Schema Builder allows you to enable and disable elements and their subelements. Future releases will also allow you to Edit Properties and Add New Element. All the elements and subelements in OpenMIC are enabled by default with no system supplied values.

a) Select ***Digital Object Workflow Management System*** from the main menu.
b) Select ***Configuration***.
c) Select ***Metadata Cataloging***.
d) Select ***Schema Builder***. Refer to the data dictionary for element definitions.
e) Select ***Descriptive***. You will see all the top level elements in descriptive metadata section. If you click on the radio button, you will see the next level elements.
f) Select the element you want to disable and click ***Disable***. A red X indicates the element is disabled.
g) Follow steps (a) – (g) for every metadata section.
h) Click ***Exit*** to return to the configuration screen.

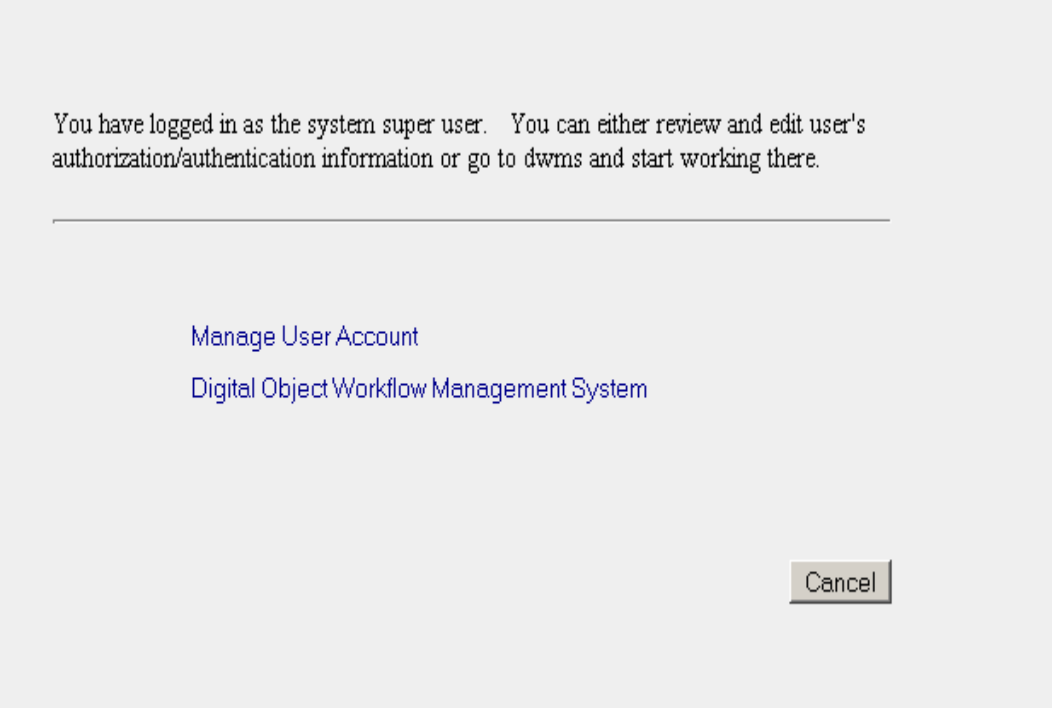
You have logged in as the system super user. You can either review and edit user's authorization/authentication information or go to dwms and start working there.
Manage User Account
Digital Object Workflow Management System
Cancel

Figure 2.1.1: OpenMIC initial screen

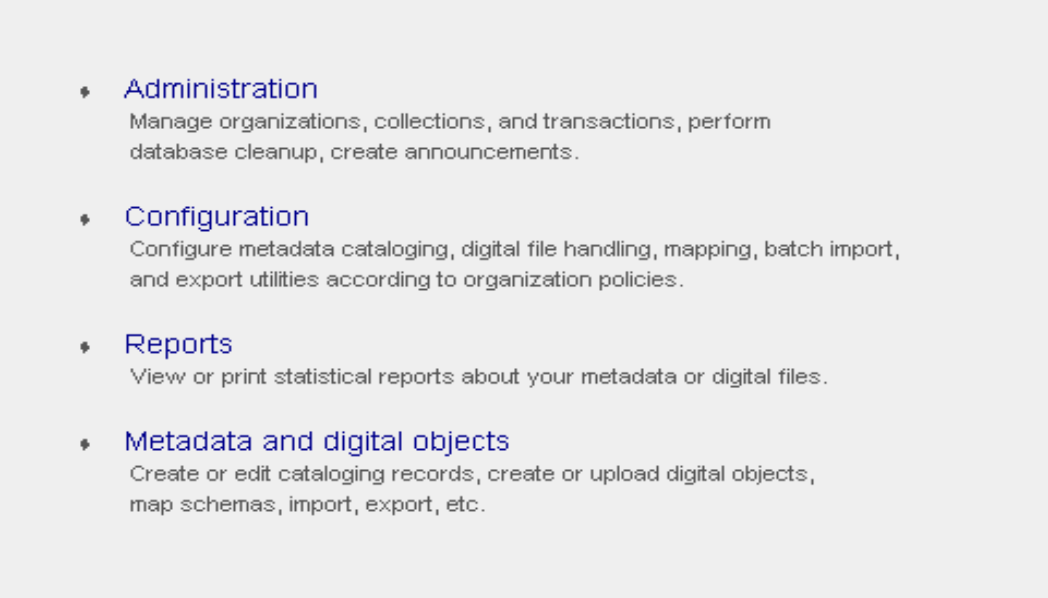
Administration
Manage organizations, collections, and transactions, perform database cleanup, create announcements.
Configuration
Configure metadata cataloging, digital file handling, mapping, batch import, and export utilities according to organization policies.
Reports
View or print statistical reports about your metadata or digital files.
Metadata and digital objects
Create or edit cataloging records, create or upload digital objects, map schemas, import, export, etc.

Figure 2.1.2: Administration screen

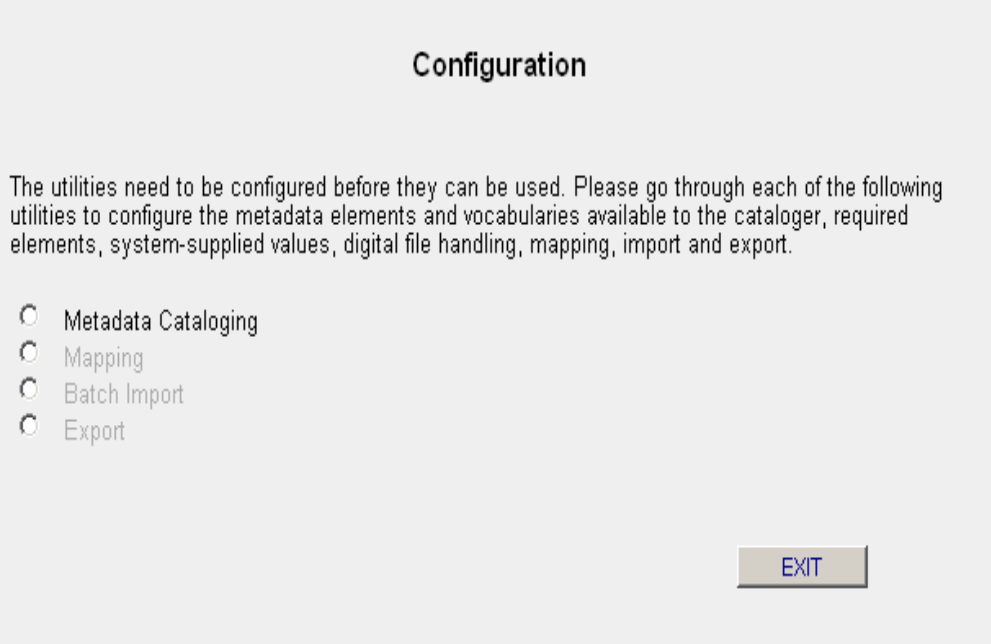
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
EXIT

Figure 2.1.3: Configuration main screen

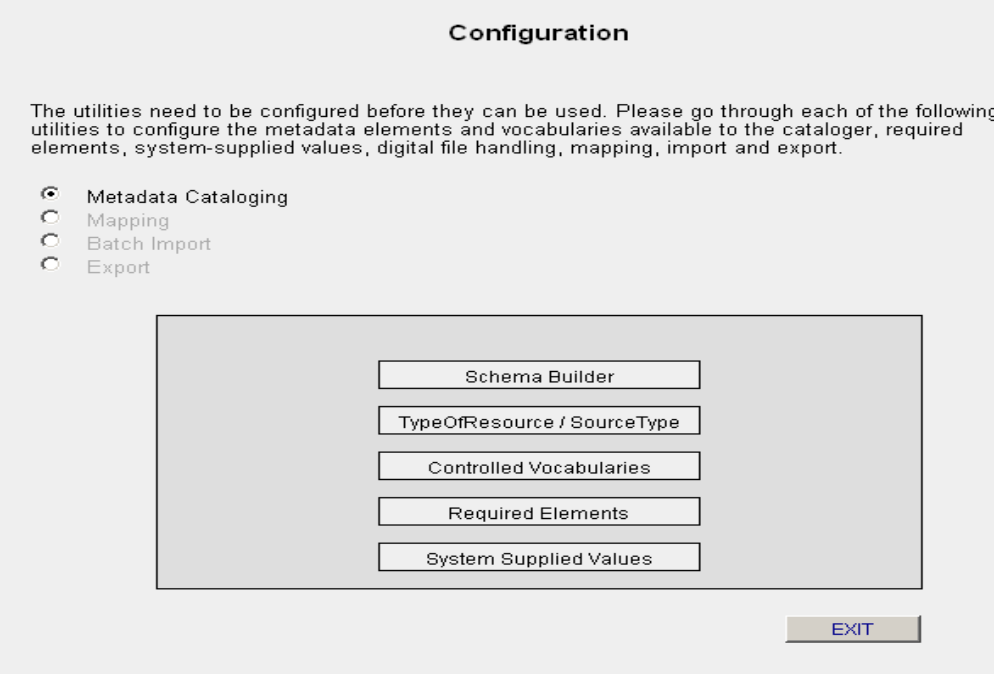
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
Schema Builder
TypeOfResource / SourceType
Controlled Vocabularies
Required Elements
System Supplied Values
EXIT

Figure 2.1.4: Metadata cataloging configuration screen

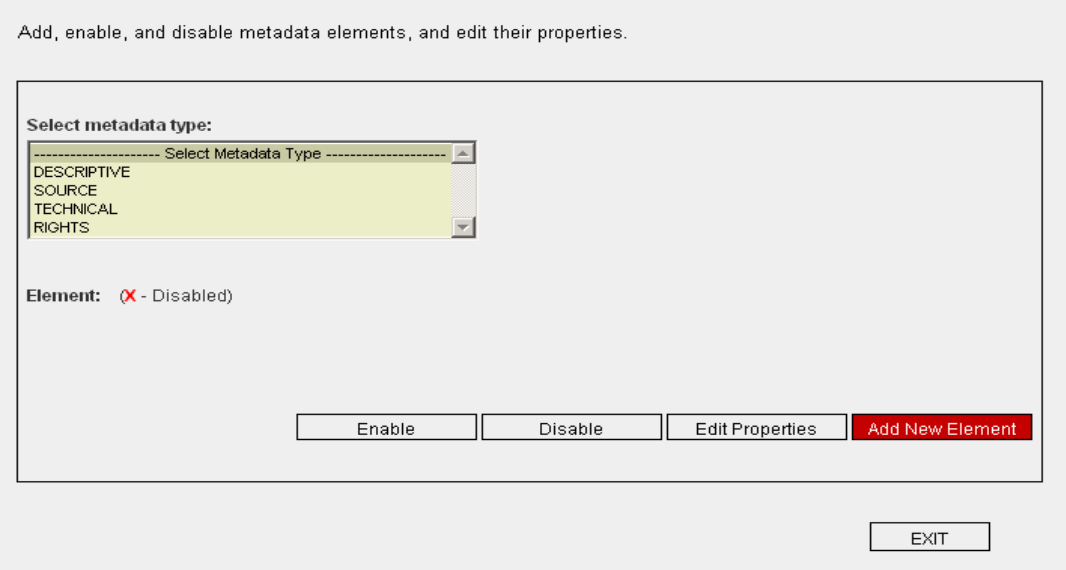

Figure 2.1.5: Metadata form configuration screen

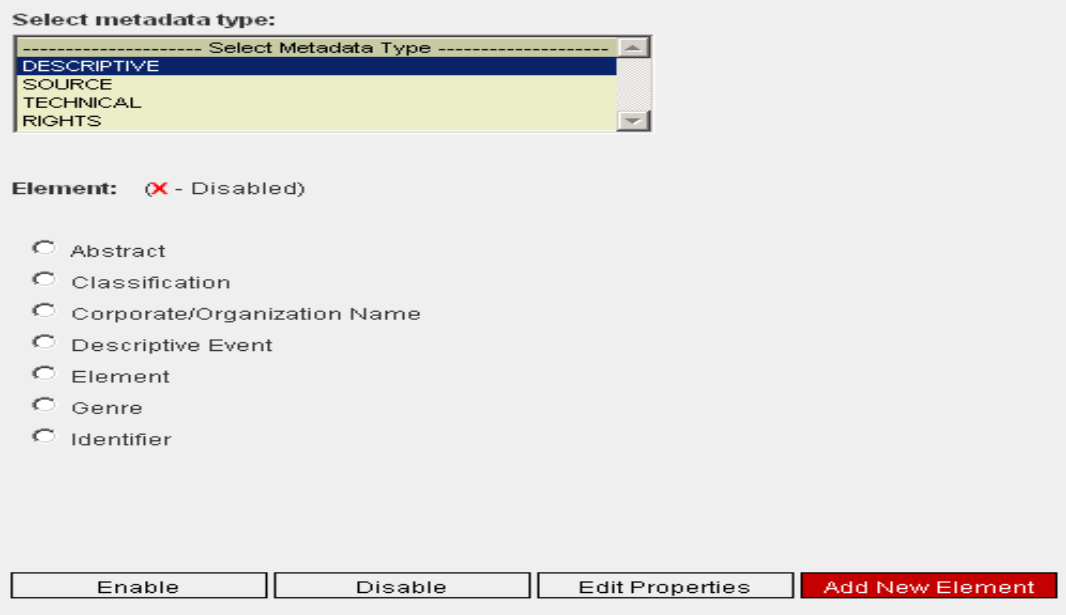

Figure 2.1.6: Descriptive metadata form configuration screen

1.2) Type of Resource or Source Type **(Figures 2.1.7 to 2.1.12)**

The data elements and vocabularies appearing on the metadata input form under Technical Metadata are determined by the value selected in the typeOfResource data element in Descriptive Metadata (labeled 'Type of Item' on the form). If your organization uses a different set of terms for typeOfResource than the default terms provided by the system, map your terms to the default types.

The data elements and vocabularies appearing on the metadata input form under Source Metadata are determined by the value selected in the sourceType element in Source Metadata. If your organization uses a different set of terms than the default terms provided by the system, map your terms to the default source types.

To configure Type of Resource: (figures 2.1.7 to 2.1.10)

a) Select ***Digital Object Workflow Management System*** from the main menu.
b) Select ***Configuration***.
c) Select ***Metadata Cataloging***.
d) Select ***TyoeOfResource/ SourceType.***
e) Select ***TypeOfResource***.
f) Select ***Organization***.
g) Select ***This organization has its own TypeOfResource terms***.
h) Enter your organization's TypeOfResource term one by one in the space provided on the left and map each term to the system supplied terms on the right. If some, but not all, of your terms match OpenMIC terms, map all your terms. If OpenMIC uses a terms your don't use and for which you have no equivalent, ignore it. See Figure 2.1.10. In this example, the organization has ignored 'Service,' as it doesn't use this term or any equivalent.
i) Click ***Submit***.
j) Click ***Exit*** to return to the configuration screen.

To configure Source Type: (figures 2.1.11 to 2.1.12)

a) Select ***Digital Object Workflow Management System*** from the main menu.
b) Select ***Configuration***.
c) Select ***Metadata Cataloging***.
d) Select ***TypeOfResource/SourceType***.
e) Select ***SourceType***.
f) Select ***Organization.***
g) Select ***This organization has its own SourceType terms***.
h) Enter your organization's Source type term one by one in the space provided on the left and map each term to the system supplied terms on the right. If some, but not all, of your terms match OpenMIC terms, map all your terms. If OpenMIC uses a terms your don't use and for which you have no equivalent, ignore it. See Figure 2.1.10. In this example, the organization has ignored 'Service,' as it doesn't use this term or any equivalent.

i) Click ***Submit.***
j) Click ***Exit*** to return to the configuration screen.

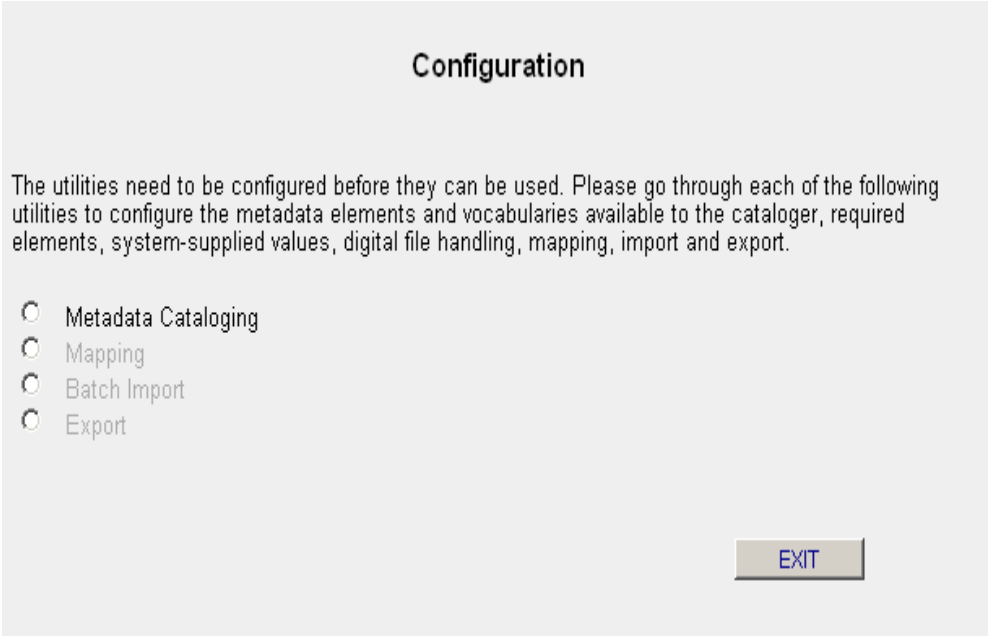
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
EXIT

Figure 2.1.7: Configuration main screen

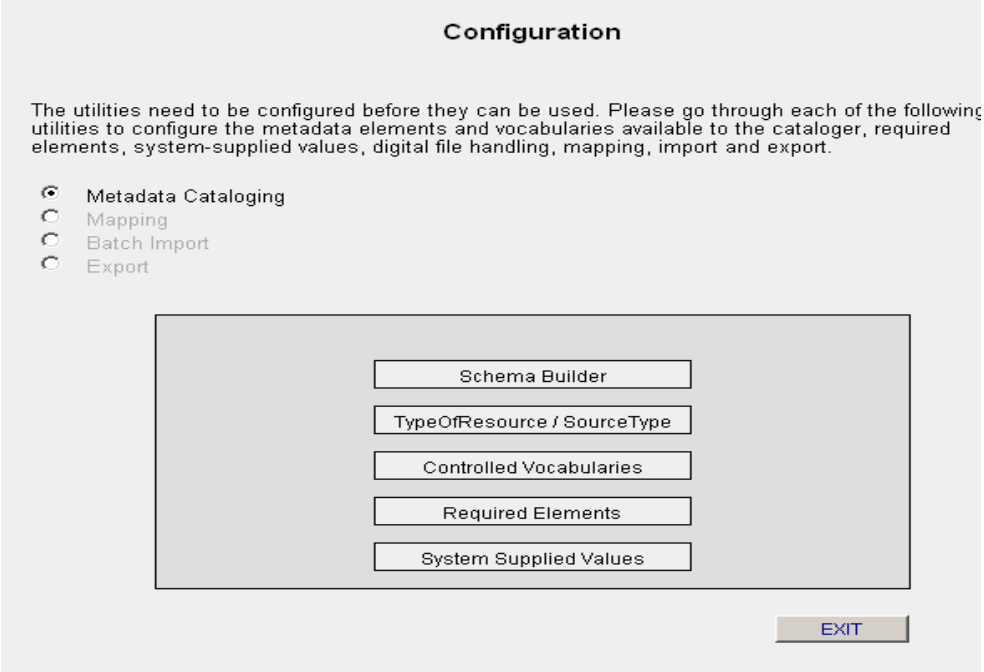
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
Schema Builder
TypeOfResource / SourceType
Controlled Vocabularies
Required Elements
System Supplied Values
EXIT

Figure 2.1.8: Cataloging utility configuration screen

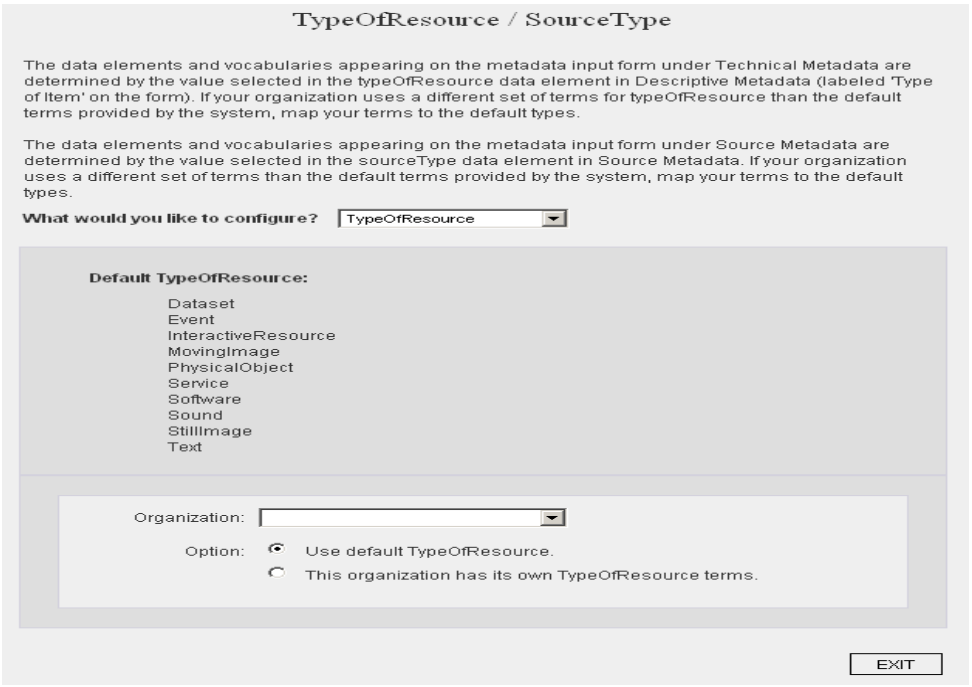
TypeOfResource / SourceType
The data elements and vocabularies appearing on the metadata input form under Technical Metadata are determined by the value selected in the typeOfResource data element in Descriptive Metadata (labeled 'Type of Item' on the form). If your organization uses a different set of terms for typeOfResource than the default terms provided by the system, map your terms to the default types.
The data elements and vocabularies appearing on the metadata input form under Source Metadata are determined by the value selected in the sourceType data element in Source Metadata. If your organization uses a different set of terms than the default terms provided by the system, map your terms to the default types.
What would you like to configure?
TypeOfResource
Default TypeOfResource:
Dataset
Event
InteractiveResource
MovingImage
PhysicalObject
Service
Software
Sound
StillImage
Text
Organization:
Option:
Use default TypeOfResource.
This organization has its own TypeOfResource terms.
EXIT

Figure 2.1.9: Type of Resource configuration screen 1

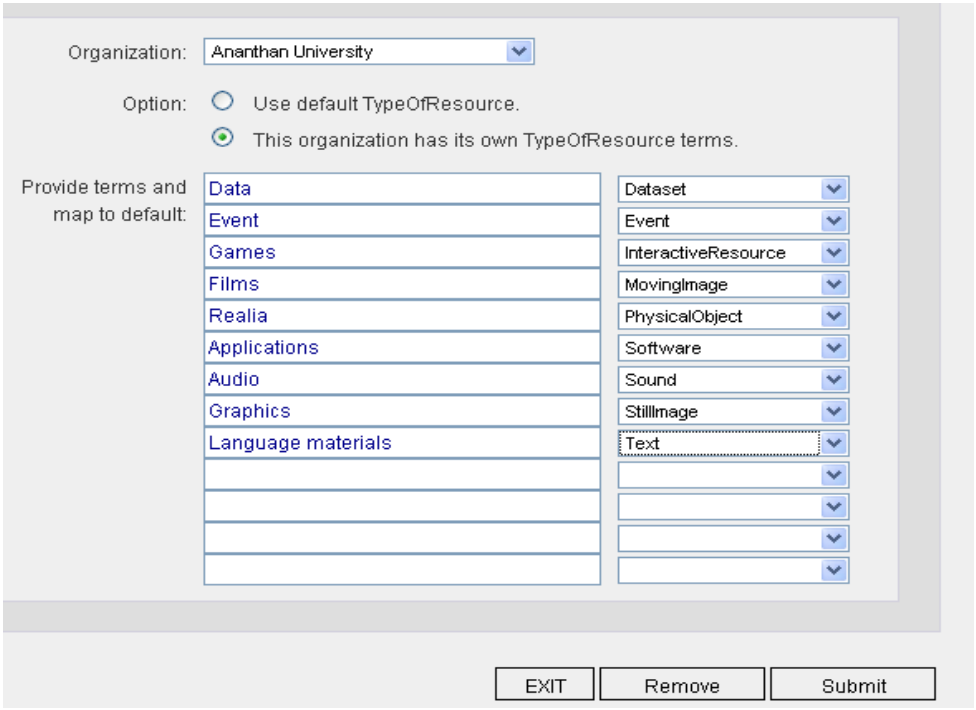

Figure 2.1.10: Type of Resource configuration screen 2

TypeOfResource / SourceType
The data elements and vocabularies appearing on the metadata input form under Technical Metadata are determined by the value selected in the typeOfResource data element in Descriptive Metadata (labeled 'Type of Item' on the form). If your organization uses a different set of terms for typeOfResource than the default terms provided by the system, map your terms to the default types.
The data elements and vocabularies appearing on the metadata input form under Source Metadata are determined by the value selected in the sourceType data element in Source Metadata. If your organization uses a different set of terms than the default terms provided by the system, map your terms to the default types.
What would you like to configure?
SourceType
Default SourceType:
Analog disc
Audiotape
Cylinder
Film
Optical disc
Photographic
Text or graphic (paper)
Three-dimensional object
Unspecified
Videodisc
Videotape
Wire recording

Figure 2.1.11: Source Type configuration screen 1

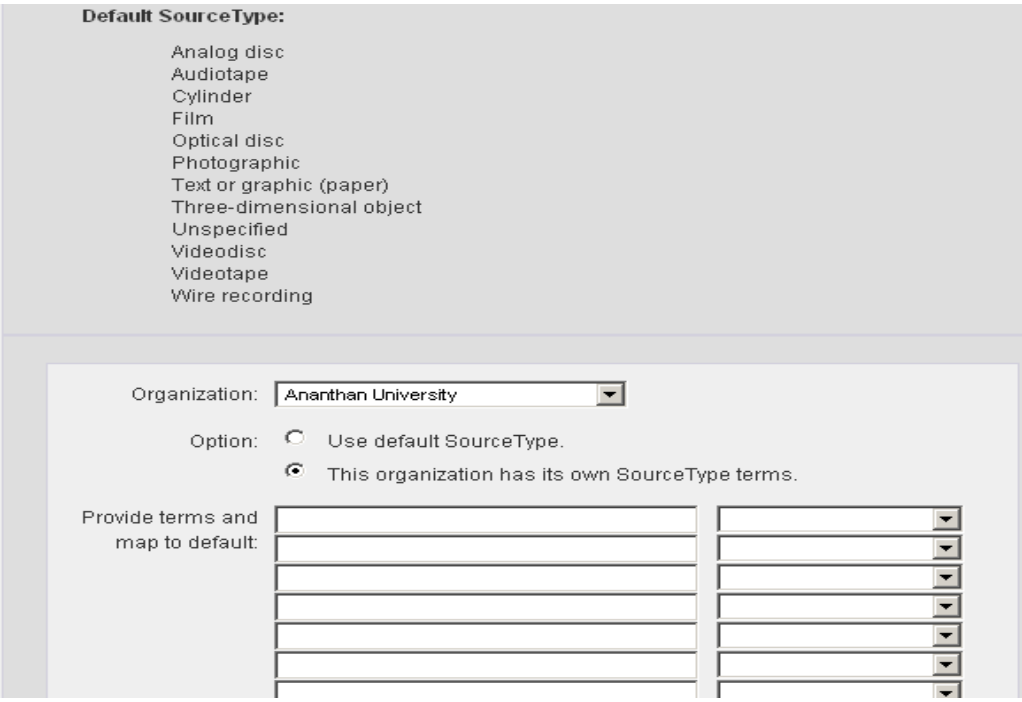

Figure 2.1.12: Source Type configuration screen 2

1.3) Controlled Vocabularies **(Figures 2.1.13 – 2.1.16)**

MODS metadata standard allows two options for inputting geographical subject terms: as a single heading (Piscataway, N.J.) or in a hierarchical form. If you choose to use the hierarchical form, you can load your terms in a batch mode. If you have disabled this element, you may skip this section.

> **Note:** To add or edit other controlled vocabularies, refer to the OpenMIC User Manual.

Follow the steps below to upload terms for each of the hierarchical geography elements:

a) Create a spreadsheet with data in the following four columns. Do not include headers. Note: If terms already exist in the system, newly uploaded terms will replace the old terms.

   United States|US|1|Marc21

   United Kingdom|UK|2|Marc21

b) Save the spreadsheet as a tab-delimited text file. If you use Microsoft Excel, go to File -> Save As, and choose Text (Tab delimited) as file type.
c) Select *Metadata Cataloging* from the configuration main screen.
d) Select *Controlled Vocabularies.*
e) Select *Country*.
f) Upload the text file.
g) Click *Upload Geographical Terms*.
h) Follow above steps for each element in the hierarchy.

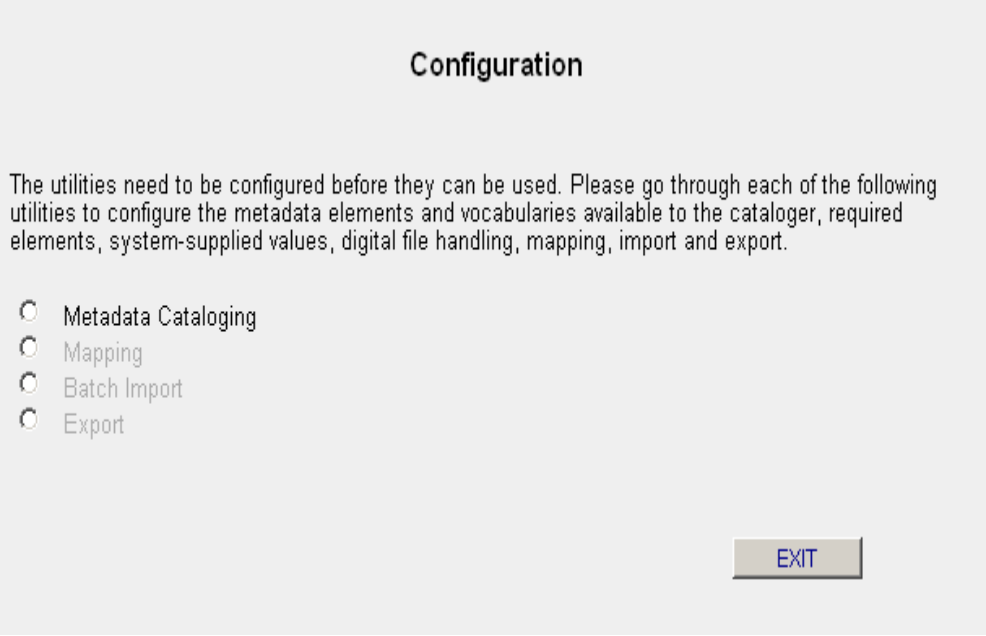
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
EXIT

Figure 2.1.13: Configuration main screen

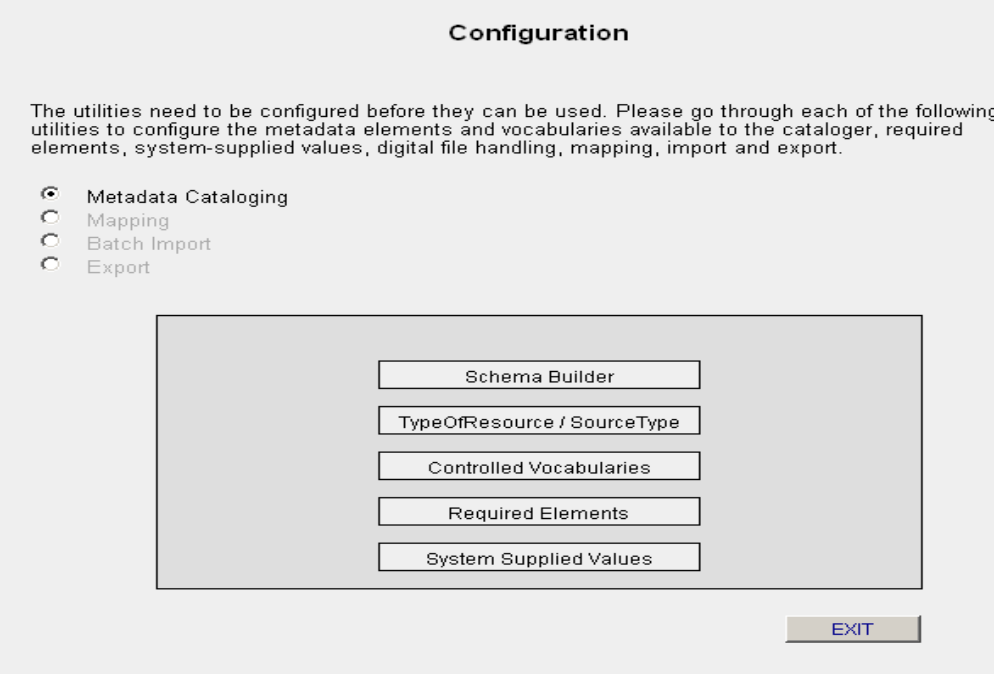
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
Schema Builder
TypeOfResource / SourceType
Controlled Vocabularies
Required Elements
System Supplied Values
EXIT

Figure 2.1.14: Cataloging utility configuration screen

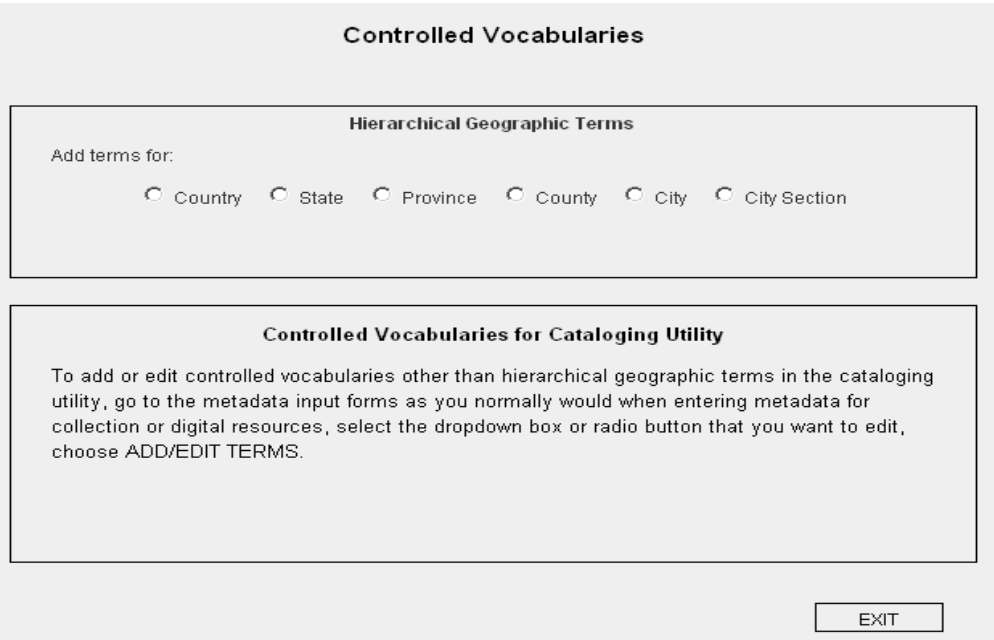
Controlled Vocabularies
Hierarchical Geographic Terms
Add terms for:
Country
State
Province
County
City
City Section
Controlled Vocabularies for Cataloging Utility
To add or edit controlled vocabularies other than hierarchical geographic terms in the cataloging utility, go to the metadata input forms as you normally would when entering metadata for collection or digital resources, select the dropdown box or radio button that you want to edit, choose ADD/EDIT TERMS.
EXIT

Figure 2.1.15: Configure Controlled Vocabularies Screen

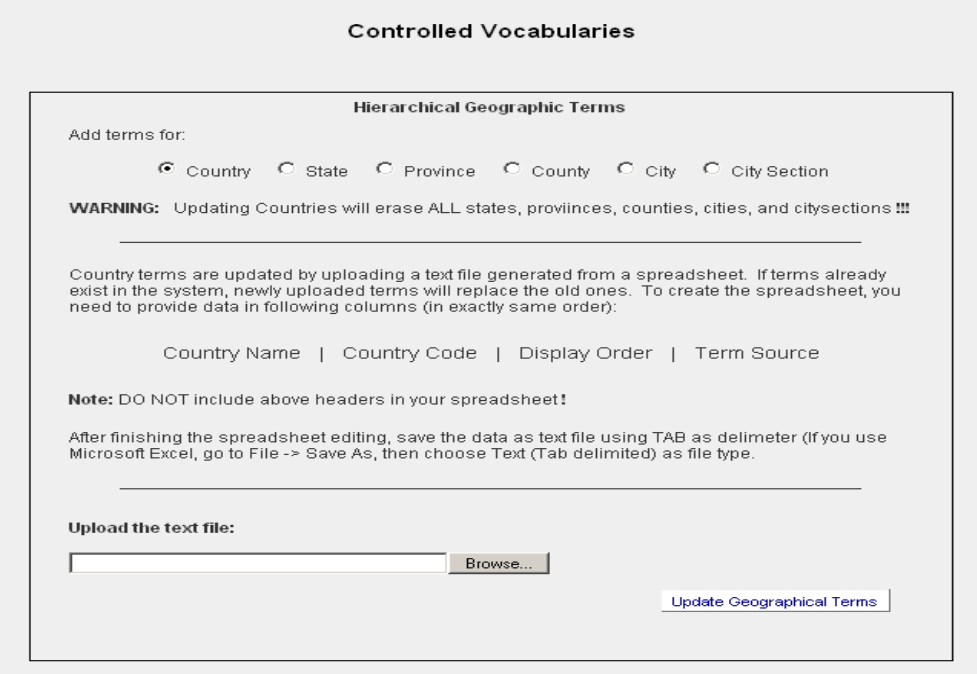
Controlled Vocabularies
Hierarchical Geographic Terms
Add terms for:
Country
State
Province
County
City
City Section
WARNING: Updating Countries will erase ALL states, proviinces, counties, cities, and citysections !!!
Country terms are updated by uploading a text file generated from a spreadsheet. If terms already exist in the system, newly uploaded terms will replace the old ones. To create the spreadsheet, you need to provide data in following columns (in exactly same order):
Country Name | Country Code | Display Order | Term Source
Note: DO NOT include above headers in your spreadsheet!
After finishing the spreadsheet editing, save the data as text file using TAB as delimeter (If you use Microsoft Excel, go to File -> Save As, then choose Text (Tab delimited) as file type.
Upload the text file:
Browse...
Update Geographical Terms

Figure 2.1.16: Configure Controlled Vocabularies Screen 2

1.4) Required Elements (Figures 2.1.17 to 2.1.19)

You may specify system-wide required elements for collection objects as well as resource objects based on your organization policies. The system will check for a value in each required elements. If a required element lacks a value, the system flags the metadata record with "M".

Follow the steps below to specify system-wide required elements.

a) Select ***Digital Object Workflow Management System*** from the main menu.
b) Select ***Configuration***.
c) Select ***Metadata Cataloging*** from the Main Configuration Screen.
d) Select ***Required Elements***.
e) Select ***Collection or Resource***.
f) Select ***Metadata Type*** (Note: Source and Technical apply to Resource only).
g) Click ***element name***. You will see the element listed under Specified Required Field Entry List. To remove an element from the required list, select the field name on that list and OK the prompt to remove the entry. Refer to the online data dictionary for element definitions.

h) Click ***Update***.
i) Repeat steps (e) –(h) for each metadata type.

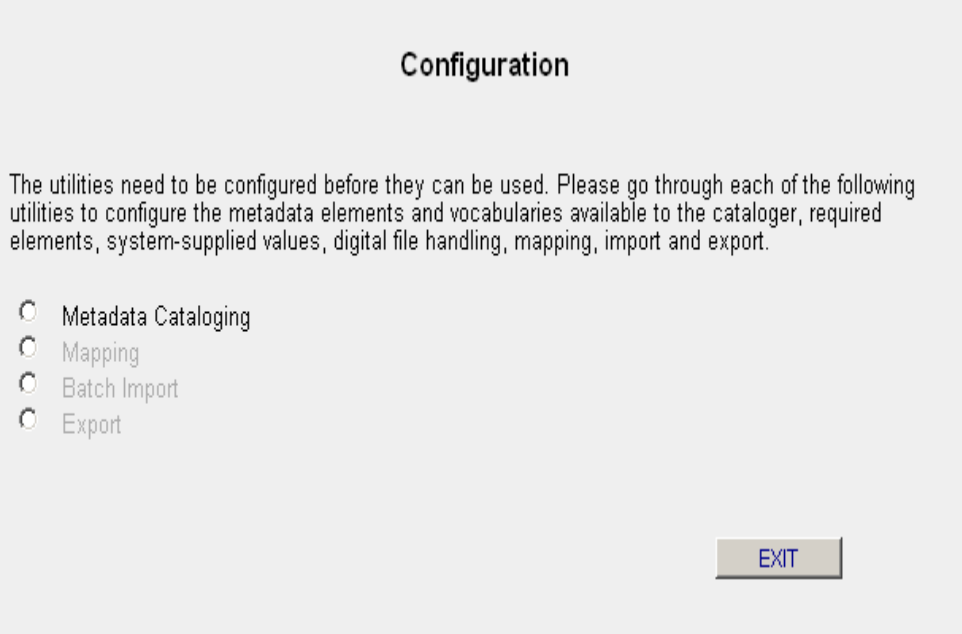
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
EXIT

Figure 2.1.17: Configuration main screen

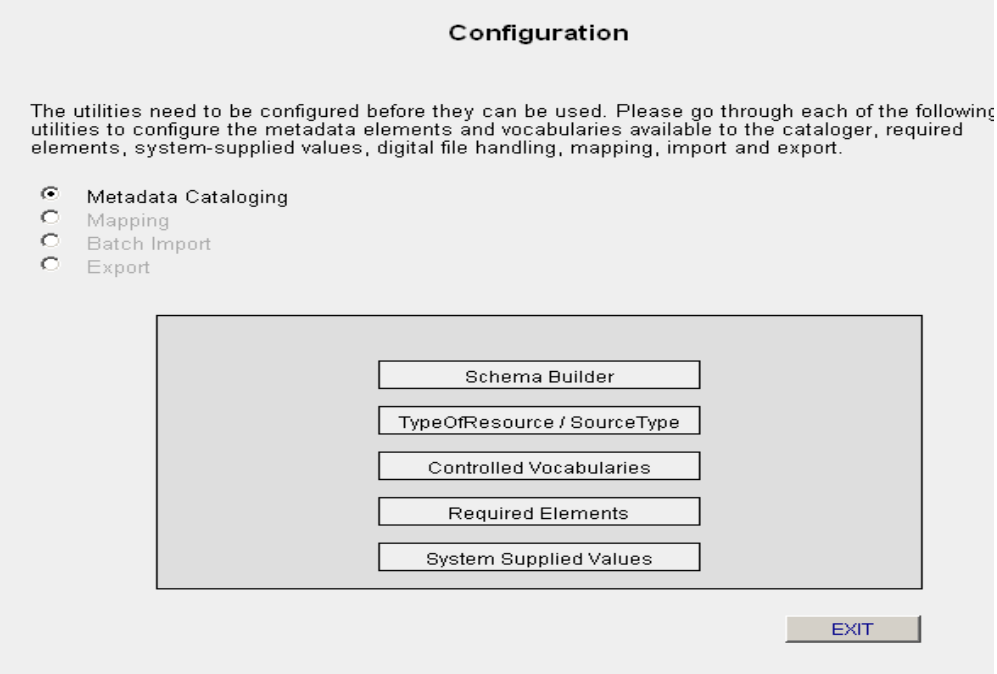
Configuration
The utilities need to be configured before they can be used. Please go through each of the following utilities to configure the metadata elements and vocabularies available to the cataloger, required elements, system-supplied values, digital file handling, mapping, import and export.
Metadata Cataloging
Mapping
Batch Import
Export
Schema Builder
TypeOfResource / SourceType
Controlled Vocabularies
Required Elements
System Supplied Values
EXIT

Figure 2.1.18: Cataloging utility configuration screen

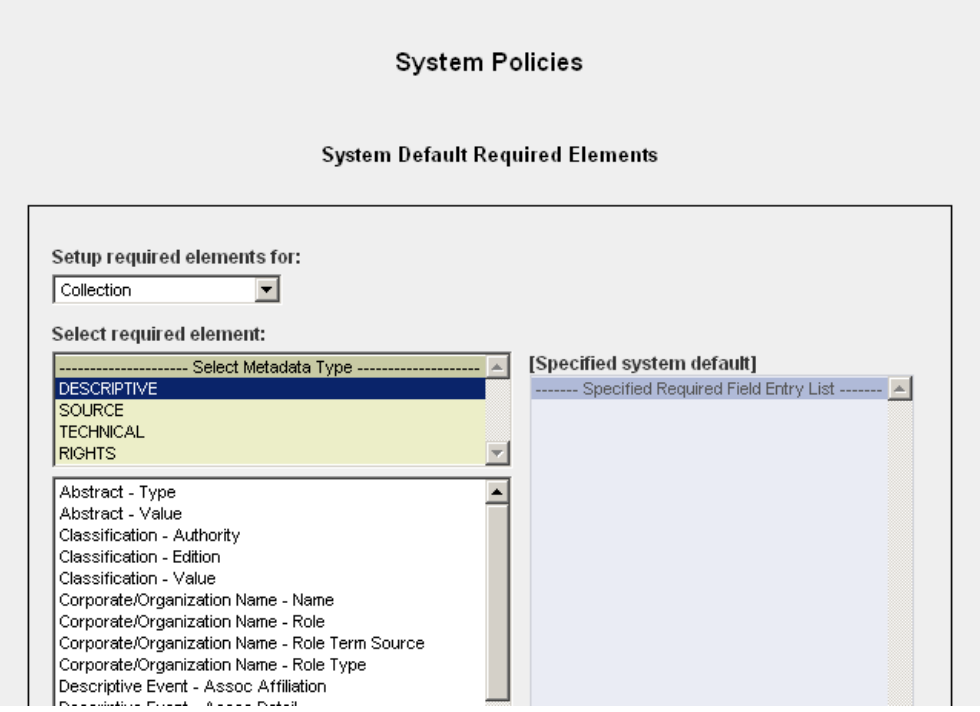

Figure 2.1.19: System default required elements screen

1.5) System Supplied Values

Not implemented in this version.

2) Mapping

Not implemented in this version.

3) Batch Import

Not implemented in this version.

4) Export

Not implemented in this version.